

OFFICE WALKTHROUGH AUDIT

Area	Pass	Fail	Item	Job Responsible	If Fail, who was responsible (names)
Lobby			Music on	Patient Coordinator	
			Beverage bar stocked	Patient Coordinator	
			Video games on	Patient Coordinator	
			Lightbulbs working	Patient Coordinator	
Consult Room			Clean desk - no visible food/drink	Tx Coordinator	
			Lights on	Tx Coordinator	
			TX Coordinator using hygiene patient checklist	Tx Coordinator	
			Tx Coordinator using daily checklist	Tx Coordinator	
Front desk			Clean desk - no visible food/drink	Patient Coordinator	
			Lights on	Patient Coordinator	
			Receptionist using daily checklist	Patient Coordinator	
			Receptionist using message tracker form	Patient Coordinator	
Hallway			No visible trash	Hygienist	
			Lightbulbs working	Hygienist	
			Music on	Hygienist	
Patient Restroom			No visible trash	Assistant	
			Fully stocked	Assistant	
			Clean	Assistant	
Staff Rest Room			No visible trash	Assistant	
			Fully stocked	Assistant	
			Clean	Assistant	
Breakroom			No visible trash	Hygienist	
			No dirty dishes	Hygienist	
Operatories			Stocked bins	Assistant / Hygienist	
			Patients have pillows	Assistant / Hygienist	
			Assistant using daily checklist	Assistant	
Sterilization			Not running very low on any item	Hygienist	
			Cassettes not piling up	Assistant / Hygienist	
Hygienists			Have Chief Complaint on screen	Hygienist	
			Using same-day dentistry scripting	Hygienist	
			Exams sheets fully filled out	Hygienist	
			Using diagnodent	Hygienist	
			Hygiene Patient Checklist being used	Hygienist	
			Hygienist using daily checklist	Hygienist	

CHART AUDIT					
Patient Name:					
	Pass	Fail	Item	Job Responsible	If Fail, who was responsible (names)
Stored Docs			Driver's License	Receptionist	
			Insurance Card	Receptionist	
			HIPPA	Receptionist	
			Photo Release	Receptionist	
			Health History	Receptionist	
			Financial Arrangement	Tx Coordinator	
			Consent Forms	Assistant	
		Insurance Verification	Insurance Coordinator		
Clinical Area			BP and Med Hx Update in notes	Assistant / Hygienist	
			Chief Complaint in notes	Assistant / Hygienist	
			Full Mouth Gum Measurements	Hygienist	
			Diagnodent Readings	Hygienist	
			Treatment plan phased	Assistant	
			Correct provider assigned	Assistant	
			Procedures completed	Assistant	
Scheduling			Recall visit scheduled properly	Hygienist	
			Treatment scheduled properly	Tx Coordinator	
Insurance and Billing			Collected due funds	Tx Coordinator	
			Set up financing correctly	Tx Coordinator	
			Claim sent	Insurance Coordinator	
			X-rays, probing, narratives attached	Insurance Coordinator	
			Adjustments and writeoffs correct	Insurance Coordinator	
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